

The Italian Traveller:

A segmentation of the Italian Market

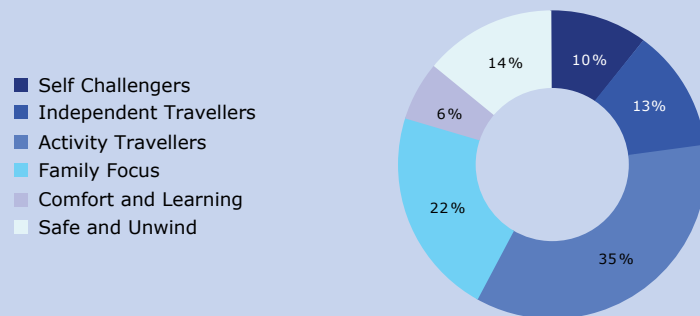


A segmentation study was undertaken on the Italian long haul traveller market to provide Tourism Queensland with a better understanding of their attitudes and motivations toward long haul travel¹. The study also allowed for the identification of the global Experience Seeker market within the Italian long haul market.

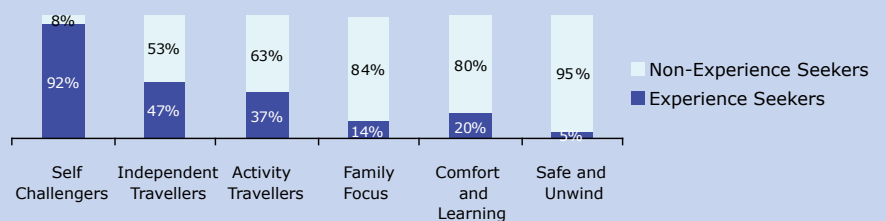
The study identified 10.5 million long haul travellers within the Italian population (22% of the adult population). Within this long haul market, six distinct segments were revealed: Self Challengers (10%), Independent Travellers (13%), Activity Travellers (35%), Family Focus (22%), Family Focus (22%), Comfort and Learning (6%) and Safe and Unwind (14%). Further, the proportion of global Experience Seekers² within each segment was identified.

Tourism Queensland has identified Self Challengers and Independent Travellers as key targets for Queensland, representing 2.4 million travellers.

Italian Traveller Segments



Proportion of Experience Seekers²



Overall, findings indicate that the average Italian Long Haul Traveller:

- is not a particularly experienced traveller, however they do have a strong desire to expand their horizons and experience new cultures
- views travel as a life enriching, exciting experience - an opportunity to satisfy their curiosity
- perceives holidays are about feeling free, comfortable, happy and relaxed – not necessarily about pushing their limits.

The key characteristics that set each segment apart from the average Italian long haul traveller are contained in the following profiles.

¹ The study format replicated recent market segmentation studies by Tourism Australia in Germany, the United Kingdom, China, Japan and the USA.

² Experience Seekers are a global consumer target identified by Tourism Australia. For more information see www.tourism.australia.com

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Self Challengers



Travel is a big part of their life. They like to immerse themselves in the local culture, language and lifestyle. They have a predisposition to adventurous locations and places that feel foreign - to challenge themselves and have new experiences. Self Challengers like to visit countries before they are discovered by too many 'tourists' - the unknown is part of the adventure. They are happy to drive around independently or to use public transport.

Self Challengers are highly experiential and exploratory. On holidays, they want to test themselves and engage in activities which allow them to broaden their minds and feel bold, connected and sociable.

Profile

- Tend to be fluent in English
- More likely to travel alone, with their partner or with their friends
- More likely to be younger (under 35 years)
- Tend to travel for two to three weeks - however are more likely than the average Italian Traveller to travel for one month or more
- Prefer to stay in moderate to low priced accommodation (budget hotels, B&B's and lodges)
- Low to medium spenders
- Most are planning to visit Australia within the next five years

Trip planning

- They start planning and booking flights one to three months in advance
- More likely to book their flights through the airline website
- More likely to plan the entire trip on their own and book their accommodation as they go - therefore are more open to using local tourism offices and travel guides for planning accommodation

Holiday activities

Self Challengers want to participate in significantly more activities including:

- Engaging with and living like the locals
- Trying new cuisine
- Engaging with the natural environment
- Photography
- Visiting family and friends at the destination
- Activities where they can learn more about themselves
- Doing community work.

Independent Travellers



Independent Travellers prefer to plan their own holidays and like to travel around and explore the destination autonomously. They are confident travelling off the beaten track into the 'unknown'. They are keen to learn some of the local language and to blend in with the locals.

Independent travellers are seasoned travellers who want to explore new cultures and destinations firsthand. They are very interested in the natural environment and desire to feel unrestricted, excited and free. Holidays stimulate their senses and enrich their lives.

Profile

- Intermediate to fluent English
- Mostly travel with their partner or with their friends
- Tend to travel for two to three weeks
- Some prefer to stay in luxury hotels while others prefer budget style accommodation
- Medium to high spenders
- They are less likely to be deterred by the distance to Australia, though feel the trip is expensive

Trip planning

- Tend to plan their trip one to four months in advance
- They are more likely to plan their own trip and book accommodation whilst travelling
- They are more likely to use the following sources when planning their trip: travel magazines/ programs, travel guides/ books, local tourist embassies and internet travel sites. Strong use of airline websites for planning flights

Holiday activities

They are out to experience more. Independent Travellers enjoy activities that allow them to engage with the cultural and/ or natural environment including visiting historical places, natural/world heritage sites/ famous landmarks, seeing the wildlife, going to local markets and trying the local food.

Activity Travellers



Activity Travellers consider themselves to be 'tourists' and prefer to travel with a guide (or with other experienced travellers). While they like to see new places, they are also more likely to consider long haul travel as a treat.

Activity Travellers seek a functional holiday where they can participate in a favourite hobby, activity or sport. They want a well planned holiday where they can challenge themselves through physical activity and achieve some lifetime goals.

Profile

- Basic to intermediate English
- More likely to be under 45 years of age
- Mostly travel with their partner, however they will also travel with friends
- Tend to travel for one to two weeks
- Prefer to stay in luxury hotels and all-inclusive resorts
- Low to medium spenders
- Not as deterred by the expense or distance to get to Australia, though are less convinced that Australia is a 'great place to visit'

Trip planning

- Tend to plan and book their trip one to three months in advance
- Travel on all-inclusive group tours or packages that are customised to their particular hobby, sport or interest

Holiday activities

Overall Activity Travellers scored lower than average across all activity categories indicating they travel to pursue their particular hobbies and interests rather than to participate in a range of activities.

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Family Focus



Safety is a key concern for Family Focus, the threat of terrorism influences where they will travel. They want a holiday that is educational and that helps them to learn more about themselves. Talking to the locals and learning some of the local language is part of the experience.

Family Focus enjoy spending time bonding with family and friends while exploring new cultures and meeting new people. They want to feel happy, carefree, comfortable and relaxed.

Profile

- Basic to intermediate English skills
- Mostly travel with their spouse, family or with friends
- Tend to travel for two to three weeks
- Prefer to stay in moderate to luxury hotels – however are more likely than average to stay with family or friends
- Low to medium spenders

Trip planning

- Trip planning and booking occurs one to three months in advance. They generally travel on packages customised to their needs.
- A key planning source is friends or relatives who either live at the destination or have visited before. If arranging accommodation, they will use internet travel sites, newspapers and magazines

Holiday activities

Family Focus are particularly interested in activities that include culture and the environment that they can experience with family and friends.

Comfort and Learning



Comfort and Learning are most satisfied when there is an educational element to their travel and a guide to help them communicate. They are less likely to regard long haul travel as a 'special treat' and are not interested in sourcing travel ideas and tips from other travellers.

Comfort and Learning like to see the well known places and famous tourist sites from the comfort and safety of a group tour. Holidays allow them to satisfy their curiosity and feel enriched.

Profile

- Basic to intermediate English
- More likely to be 50 years or older
- Mostly travel with their partner or with friends
- Tend to travel for one to two weeks
- Prefer to stay in luxury hotels
- High spenders
- Are more likely to perceive Australia as being too expensive and too far to travel for a holiday

Trip planning

- Trip planning and booking occurs one to three months in advance. They generally travel on customised packages specific to their requirements and on all-inclusive group tours. Accommodation is often part of a package
- They are more likely to use travel books or guides when planning their trip

Holiday activities

Comfort and Learning enjoy visiting famous sites and landmarks and going on guided tours. They are less likely to be interested in the sun, beach and visiting friends or family while on holidays.

Safe and Unwind



Budget and safety are key holiday considerations so they are more likely to choose safe destinations and shop around for great deals. Safe and Unwind travellers are happy to be called 'tourists' and like to know that a guide is available to them. A great holiday is thoroughly planned and includes great service.

Safe and Unwind enjoy a well researched and planned holiday in a safe destination that allows them to feel secure and comfortable, organised and ordered. Holidays are about enjoying themselves, relaxing, unwinding and leaving the cares of the world behind.

Profile

- Basic English skills
- Travel with their partner
- Tend to travel for one to two weeks
- Prefer to stay in luxury accommodation and all-inclusive resorts
- Low spenders

Trip planning

Safe and Unwind plan and book their trip one to three months in advance. They tend to travel on all-inclusive group tours and customised tours (which include accommodation and flights). They are the most likely to make all their travel arrangements through a travel agent.

Holiday activities

They are more likely to plan their holidays around taking guided tours and day tours and visiting tropical islands. They enjoy the sun, beach, relaxing, spending time with friends and family, shopping and photography. They do not wish to spend time in the wilderness.